



Ipsos Reid



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Points de vue sur l'état de l'économie **Rapport sommaire**

Présenté au : Bureau du Conseil privé

Présenté par : Ipsos Reid

5 mai 2009

Ipsos Reid
Bureau 1400
1, rue Nicholas
Ottawa (Ontario)
K1N 7B7
Tél. : 613 241-5802
Télec. : 613 241-5460

« This report is also available in English upon request. »

Préface

Chargé de projet :

Bureau du Conseil privé
85, rue Sparks, 6^e étage
Bât. Blackburn
Ottawa (Ontario)
K1A 0A3

À l'attention de : Geneviève Binet (ou le représentant autorisé)
Téléphone : 613 957-5168
Télécopieur : 613 957-5079
Courriel : gbinet@pco-bcp.gc.ca

Autorité contractante :

Travaux publics et Services gouvernementaux Canada
Direction de l'approvisionnement en communication
Constitution Square
360, rue Albert, 12^e étage
Ottawa (Ontario)
K1A 0S5

À l'attention de : Jacques Gariépy (ou le représentant autorisé)
Téléphone : 613 998-8582
Télécopieur : 613 993-2581
Courriel : jacques.gariepy@pwgsc-tpsgc.gc.ca



Ipsos Reid

Contexte

Le Secrétariat des communications et des consultations du Bureau du Conseil privé (BCP) conseille et appuie le gouvernement du Canada et les ministères/agences en ce qui concerne des questions liées aux communications et aux consultations et facilite la coordination des activités du gouvernement à cet égard. La recherche d'opinion publique représente un outil pour accomplir ce mandat.

Dans cette optique, le BCP a jugé bon de mener une étude qualitative sous la forme de groupes de discussion pour connaître les préoccupations et les perceptions des Canadiens par rapport à la situation économique actuelle et leur vision du bien-être économique.

Plus précisément, l'étude qualitative portait sur les perceptions des Canadiens en ce qui concerne l'état de l'économie au Canada en ce moment et leur vision du bien-être économique ainsi que sur les perspectives pour l'année qui s'en vient. En définitive, l'objectif de l'étude était de permettre au BCP de mieux comprendre comment communiquer des questions économiques complexes à la population canadienne de manière claire et facile à comprendre. Les résultats de l'étude aideront le BCP à élaborer des stratégies et des produits de communication conviviaux.

Méthodologie

Ipsos-Reid a organisé une série de 10 groupes de discussion composés d'adultes de Coquitlam, de Windsor, de Brampton, de Sherbrooke (en français) et de Frédéricton. Les rencontres se sont déroulées entre le 2 et le 8 avril 2009.

Dans toutes les villes, 12 participants avaient été recrutés dans chaque groupe pour assurer la présence de 8 à 10 personnes. Les participants ont reçu une somme de 85 \$ en guise de remerciement sauf à Coquitlam, où ils ont reçu une somme de 100 \$. Ces sommes ont été offertes pour inciter les participants à se présenter aux rencontres et couvrir les frais de transport et de stationnement.

Un mot sur les rapports sur les groupes de discussion :

Les données qualitatives recueillies lors des rencontres de groupe sont analysées par des chercheurs qui établissent des rapprochements et font une synthèse des principaux thèmes, des sujets sensibles et des réponses courantes tirées des discussions. L'analyse des résultats qualitatifs permet d'obtenir des tendances et des indications sur la façon dont le public cible perçoit les enjeux à l'étude. Toutefois, les résultats d'une étude qualitative ne sont pas représentatifs de la population générale.



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Faits saillants

- Les participants expriment un optimisme mesuré à l'égard de la situation économique du Canada, plusieurs signalant qu'elle n'est « pas pire » qu'ailleurs dans le monde. Quelques-uns sont d'avis que l'économie du Canada a atteint son plus bas niveau et que la situation commencera probablement à s'améliorer à plus ou moins court terme (12 à 18 mois).
- Malgré tout, des préoccupations demeurent : le chômage et notre économie sont le plus souvent mentionnés. Le lien qui existe entre l'économie du Canada et celle des É.-U. est perçue comme une source d'inquiétude pour l'avenir.
 - Si les problèmes dans les secteurs immobilier et financier peuvent être vus comme étant les principaux responsables du ralentissement économique à l'échelle mondiale, très peu de participants les perçoivent comme une source d'inquiétude au Canada.
- Les participants s'attendent à ce que le gouvernement soit plus présent et proactif pour ce qui est de communiquer les mesures prises pour contrer le ralentissement économique. Ils veulent comprendre quelles mesures sont prises par le gouvernement.
- Au sujet de l'économie, la plupart des participants disent que le gouvernement doit s'attaquer au chômage (par la formation en emploi, la création d'emplois par la promotion de l'innovation/les nouvelles technologies/les technologies vertes), envisager des dépenses en infrastructures dans un effort pour créer des emplois et stimuler l'économie, promouvoir le démarrage d'entreprises/de PME (création d'emplois) et offrir des réductions/crédits d'impôt pour contrer la hausse du coût de la vie.





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Views on the State of the Economy Executive Summary

Submitted to: Privy Council Office

Submitted by: Ipsos Reid

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Ipsos Reid
One Nicholas Street,
Suite 1400
Ottawa ON K1N 7B7
Tel: 613.241.5802
Fax: 613.241.5460
www.ipsos.ca

«Ce rapport est aussi disponible en français sur demande»

Preface

Project Authority:

Privy Council Office
85 Sparks Street, 6th floor
Blackburn Bldg.
Ottawa, Ontario
K1A 0A3

Attention: Geneviève Binet (or the authorized representative)
Telephone: 613-957-5168
Facsimile: 613-957-5079
E-mail: gbinet@pco-bcp.gc.ca

Contracting Authority:

Public Works and Government Services Canada
Communication Procurement Directorate
Constitution Square
360 Albert Street, 12th Floor
Ottawa, Ontario
K1A 0S5

Attention: Jacques Gariépy (or the authorized representative)
Telephone: (613) 998-8582
Facsimile: (613) 993-2581
E-mail: Jacques.gariepy@pwgsc-tpsgc.gc.ca



Ipsos Reid

Background

The Communications and Consultations Secretariat of the Privy Council Office (PCO) provides advice and support to the Government of Canada and to departments/agencies on matters relating to communications and consultations, and facilitates the coordination of the Government of Canada's activities in these areas. One tool used in order to fulfill its mandate is public opinion research.

In keeping with this mandate, PCO identified a need to conduct qualitative research through the use of focus groups to explore the concerns and the perceptions of Canadians on the current state of the economy and their sense of economic well-being.

More specifically, qualitative research explored Canadians' perceptions as they relate to the state of Canada's economy and their sense of economic well-being at the present time, as well as their economic outlook over the coming year. Ultimately, this research was intended to provide PCO with a better understanding of how to communicate complex economic issues to the Canadian public in a manner that is easily and clearly understood. Research findings will assist PCO in developing communications strategies and products that are user-friendly.

Methodology

Ipsos-Reid conducted a series of ten focus groups with adult residents of Coquitlam, Windsor, Brampton, Sherbrooke (French) and Fredericton. These groups were conducted between April 2nd and April 8th, 2009.

In all locations 12 participants were recruited per group in order to ensure that between 8 and 10 were present for the groups. Participants were paid an \$85 incentive for their participation, with the exception of Coquitlam where participants received a \$100 incentive. Incentives were paid in order to encourage attendance and to assist with defraying commuting and parking expenses.

A Note on Focus Group Reporting:

Qualitative data from focus group sessions are reviewed by researchers who draw out continuities and synthesize the main themes, critical points, and common responses from the discussions. The analysis of qualitative findings yields tendencies and indications of how the target audience perceives the study issues. However, the results of qualitative research are not representative of the broader population.



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Key Findings

- Participants expressed measured optimism with regard to Canada's economic situation, many saying things are "not as bad" as elsewhere around the world. Some were of the view that Canada's economy has bottomed out and that things would likely start improving in the relatively short term (one year to eighteen months).
- Despite this, concerns do exist: unemployment and our economy were most often mentioned. Canada's intertwined economic relationship with the U.S. was seen as another source of concern going forward.
 - While problems in the housing market and financial sectors may be seen as the primary culprits for the economic slowdown internationally, very few see these as sources of concern in Canada.
- Participants' expectation was that the Government would be more present and proactive in terms of communicating the steps being taken to counter the economic slowdown. They want to understand what action the Government is taking.
- On the economy, most said that the Government needs to address unemployment (through job training, job creation through promotion of innovation/new technologies/ green technologies), consider infrastructure spending in an effort to create jobs and stimulate the economy, promote business start-ups/SMEs (job creation) and provide tax cuts/credits to counter a rising cost of living.





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Views on the State of the Economy

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Ipsos Reid
One Nicholas Street,
Suite 1400
Ottawa ON K1N 7B7
Tel: 613.241.5802
Fax: 613.241.5460
www.ipsos.ca

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Top of Mind Concerns

Concerns about the state of Canada's economy in the context of the current global downturn continue to be top of mind among participants in all regions. When prompted for specifics, participants most often framed their concerns in the context of:

- Job security,
- Unemployment,
- Rising cost of living, and
- Media hype related to a slumping economy.

"When your pay is reduced by 40%, it's stressful."

"There are too many layoffs, the economy isn't doing well."

"Work is stressful.... We're owned by a U.S. company that's cut back."

"Things have been tight, being a single parent and trying to afford normal expenses."

"Life is working just to save money, not because you like your job."

"Les gens n'arrivent plus à payer leurs maisons à Sherbrooke, on le voit à tous les jours."

Healthcare, crime (particularly in Vancouver) and the environment are also mentioned as areas of concern. It should be noted however that although these issues were deemed important, as in the previous sounding they continue to be secondary concerns for focus group participants compared to the economy.

The Current Situation

Most participants were of the view that Canada is doing relatively well 'all things considered.' Interestingly, as was the case in the previous round of focus groups, participants continue to frame their answers in economic terms. In fact, many were of the view that in purely economic terms Canada was faring better than many others particularly when compared to the U.S., and to a lesser extent the U.K. and other European countries.

"In world economic standards, Canada is supposed to be better off... we are lucky to be Canadian."

"We're one of the last countries to be affected by this recession. Because we're the last, hopefully we'll be the first to pull out."

« Au niveau du Canada les statistiques sont mieux que les États-Unis... ce sont de bonnes nouvelles. Le Canada est bien positionné. On est un peuple d'inventeurs, d'innovateurs. »

Participants' views of Canada's economic situation were generally founded in positive impressions of our country's strong banking system and its built-in safeguards which, according to most, have prevented a similar situation to that in the U.S. from occurring here in Canada.

"Our banking system is a lot better than the rest of the world, that's what saved us here."

« Le Canada s'en sort par rapport aux États- Unis, on a un meilleur système bancaire. »

Views on the Government

When asked specifically for their views on how things are going in Ottawa, participants in this most recent round of focus groups expressed a desire for an increased public presence from the Government in these trying economic times. Many mentioned that they would appreciate hearing directly from our leaders what specific steps have been and are being taken to address the economic challenges we are facing. Participants made comparisons to how proactive and public U.S. leadership has been recently in terms of providing feedback on measures being taken to counter the effects of the economic downturn in that country.

“Ottawa is kind of quiet, I haven’t heard much about what they are doing.”

“On a vu le Premier ministre au G20 mais on ne l’a pas entendu parler.”

When asked what action the Government has taken to address the economic downturn, there was limited awareness of specific measures. For the most part, participants knew that the Government was providing assistance to certain industries and was talking about making increased investments in infrastructure. When prompted for more specific actions, many mentioned the home renovation tax credit and a few were aware of an extension of E.I. benefits, or mentioned the action by the central bank to decrease interest rates.

Accountability loomed large in the discourse of many around the table. Most were aware that any Government efforts to stimulate the economy would likely result in significant government spending. Although few disagreed with this approach, most were of the view that sufficient checks and balances needed to be in place in order to prevent taxpayer money being squandered. In fact most agree that there is a need for the Government to be transparent, provide regular and timely updates on expenditures, inform Canadians on the intended results, and provide regular feedback on actual outcomes.

“Personally I don’t think the Government is all too clear with what they are doing with our money. I have no idea where my money is going ...”

“The Government is talking but I haven’t actually seen anything...”



Views on the Economy

The Economic Mood

Despite expressing concern about job slowdowns and losses, slumping markets, the rising cost of living, and the situation in certain regions of Canada (particularly Ontario's auto sector and Alberta's oil and gas sectors) most said Canada's economic prospects were likely not as bad as others, particularly when compared to the U.S. and the U.K. As previously mentioned this was largely attributable to Canada's strong and stable banking system.

Looking forward, focus group participants tended to express measured optimism that the economy would be doing better in a not so distant future. In fact, many were of the view that Canada's economic prospects had likely bottomed out and that signs of an economic recovery would likely emerge in the next 12 to 18 months.

"We'll come out of this thing as fast as we went into it. There are good things going on out there as well. "

"I don't think it will get much worse, when people start buying cars again; that will be a sign that the economy is better."

"I think the Government will make changes by the end of year, to ensure that we don't go through 2010 the same way."

Furthermore, it should be noted that some participants were philosophical when speaking of the current economic circumstances, often saying that markets tend to experience normal highs and lows and that the current situation was simply part of a normal market correction, the normal business cycle.

"This kind of thing is cyclical, it happens every ten years or so."

"It (the economy) has always been cyclical, right now we are in the valley."

That said, there were those around the table who expressed concern that the full effects of this global downturn have yet to be felt and that the road to recovery would likely be much longer than most anticipate.

"It will be three or four years before we're out of this, the economy was doing so well for so long I think it was bound to happen."



Industry Support

This round of focus groups coincided with numerous media stories about the significant financial challenges being faced by the auto industry's Big Three and the possible need for governments to step in and provide some level of funding in support of the auto sector.

Consequently much of the discussion surrounding the current economic situation focused on the appropriateness of to industry support or loans – which are not seen as viable long-term alternatives by most participants. There was a general feeling that this approach would amount to nothing more than a stop gap solution to a situation which is in dire need of systematic change.

More specifically, some participants (particularly those outside Ontario) wondered about the wisdom and appropriateness of additional government funds towards the auto sector in particular, which was seen as having been mismanaged, and whose sustainability is questionable in the long term. There was some willingness (particularly among those in Windsor and Brampton) to consider repayable loans as a way of assisting the auto sector and its related industries as they face hard times.

“At what point did companies like GM become our responsibility... I don't understand how year after year they can say ‘We screwed up again, give us another shot.’”

“Bailing out companies is a danger, use the money (bailout money) to help them but not bail them out; it's better to fire the executives and pay the unemployed their wages until they find a new job.”

“Dans l'industrie de l'automobile, ils n'ont pas été assez brillants pour voir que c'est les petites voitures qui étaient en demande. GM c'est pas la deuxième fois qu'ils se font aider?”

There were numerous references to the current difficulties being directly attributable to poor business decisions and ongoing mismanagement. Indeed, many participants mentioned that the troubles experienced by some companies could have been minimized had industry heads done a better job of anticipating the challenges ahead rather than focusing on short term profits.

“Why are CEOs getting bonuses when the company is losing money? With me if I don't get the sale I don't get paid.”

“I'm against a bailout because GM has lost money since 2005.”

“GM prend des gros bénéfices au rendement et là va à la faillite. Illogique. Ce n'est pas logique que le gouvernement fournisse de l'aide.”



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Economic Downturn – the Media’s Role

As in previous groups conducted in January, many participants suggested that much of the economic gloom and doom they had seen, heard and read about of late was likely hyped by the media. In fact, a number of participants expressed concern and in some cases anger with what they see as the media’s unbalanced reporting of economic events. Participants questioned why the media focus seems to be on the minority of Canadians and businesses who are facing difficult times rather than the majority, who are doing ok.

“There are a lot of fears in the media and people stop buying because of fear -- they may have money but they stop buying.”

“The media is focusing on the 8% who are unemployed instead of the 92% who are working.”

“Ça va très bien. Les journalistes nous font voir les choses plus noires qu’elles le sont, il y en a 10 % qui sont au chômage mais il y en a 90% qui travaillent!”

There was a sense among some that the media should spend more time looking for glimmers of hope and the silver lining rather than focusing on the daily reports of plant closings, job losses and disappearing retirement savings.

“I prefer to hear that things are going to get better, if you remain upbeat, then generally people will feel better about themselves and their country.”

Origin of the Economic Downturn

Despite their recognition that the current state of the economy was a source of concern, most participants recognized that the current situation originated outside Canada’s borders, resulting primarily from a lack of regulation of the financial sector and the consequent bad mortgage debt in the U.S.

“On a beau parler de tel ou tel politicien, la solution n’est pas simple, il faut voir aux États-Unis...”

Many participants understood that the current downturn is global, affecting some of the world’s largest economies: the U.S., Britain and other European countries.



The Regional Perspective

Coquitlam

Participants in Coquitlam generally viewed their economic situation as better than the country's as a whole. The absence of any significant manufacturing sector, the predominance of service industries, a largely diversified economy and the upcoming 2010 Olympics, with its obvious effect on job creation as well as the anticipated influx of tourism dollars, were cited as reasons British Columbia would likely fare better than most in the short and medium term.

Windsor

Perhaps not surprisingly participants in Windsor were much less likely to have an optimistic outlook given the enormous role played by the auto sector in the area. This was particularly true for participants in the lower income group. As was the case in other regions many participants were of the view that the economy is likely about as bad as it will get and that recovery will follow. However, unlike their counterparts in other regions, participants in Windsor generally envisaged a much longer timeline to recovery, generally defined as three to four years, compared to the 12 to 18 month predictions seen elsewhere.

Participants in Windsor tended to see repayable loans to industry as part of the solution to the current troubles affecting the auto industry – Chrysler is often given as an example where such an approach has proven successful in the past.

On the other hand, many other participants, particularly in the higher income group, expressed concern that the Big Three are not sustainable in the future because of evolution in the auto industry (better quality foreign cars being built at lower labour costs). In that sense, these participants saw investments by governments as possibly simply spending good money after bad. Many participants in both groups expressed a desire to see more economic diversity in their area although the idea of a regional economic development agency did not capture their attention or interest. This was perhaps explained by:

1. A general disbelief that their region would ever benefit from any infrastructure investments, and
2. Past examples of unfulfilled “promises” such as the lack of progress on the promised investment in better infrastructure linking the 401 and the U.S. border.

Brampton

Most participants in Brampton had the impression that things were probably worse elsewhere than they are in their area. Many participants mentioned that they themselves are “not feeling it yet.” Interestingly, several people in both groups mentioned that Ontario is the “economic engine of Canada,” and as such, will lead the recovery. In this sense, there was very much a view that the Government of Canada ought to invest in Ontario in order to stimulate the economy, and that, until now, Ontario has been more of a giver than a receiver

Several participants in each of the groups were familiar with at least the fact that the Government had committed to large investments in infrastructure and to struggling sectors.

As was the case in Coquitlam, Sherbrooke and Fredericton, participants in Brampton were divided on the value of shoring up certain sectors, especially the auto sector.

Awareness of a possible regional development agency for Southern Ontario was non-existent. That said, there was agreement that such an organization would be a good idea, if it focused on promoting new and alternative types of manufacturing and green technologies.

Sherbrooke

Participants in Sherbrooke generally viewed their economic situation as being better than the country’s as a whole. They pointed to the province of Quebec’s relatively low reliance on the manufacturing sector, evidence of strong retail and residential construction sectors, and the diversified nature of the province’s economy, as factors that contributed to lessening the impact of the economic downturn in Quebec.

Fredericton

Participants in Fredericton were generally of the view that things were better in New Brunswick than in Canada as a whole, particularly compared to Ontario or Alberta. As evidence of their comparative advantage, participants pointed to retail spending, new construction starts, and a relatively lower cost of living. Moreover, many indicated that they are better equipped to weather economic storms because economic hardship is nothing new for residents of Atlantic Canada, it is simply part of living on the East Coast.

Signs that times are tough

While generally speaking participants were of the view that the current economic downturn is affecting others more than it is them, when specifically prompted for examples of the impact the economic downturn is having around them, participants were quick to point to:

- Job losses /unemployment – particularly in the case of the auto-sector in South-western Ontario;

“We’ve lost so many jobs in manufacturing and now it’s in service, it’s terrible.”

- Diminishing retirement savings – perhaps not surprisingly this was of particular concern for older participants around the table who were doubtful as to their ability to recover lost savings;

“I’m not going to have time to recoup what I’ve lost, I’m 68 years old, I may have to sell my home, and we aren’t millionaires.”

“The older generation has lost a lot of investments so they may have to work longer.”

- Personal bankruptcies – A few participants (in Sherbrooke) related their personal experiences dealing with bankruptcies as of late;

“Je suis une syndic en faillite et je suis débordée. Auparavant on traitait de quatre ou cinq faillites par semaine, maintenant y en a trente!”

- Rising cost of living (rent, food);

“La nourriture est très chère, mon budget était de 110 \$ par semaine pour de la nourriture pour moi et mon mari et j’ai du passer à 140\$ par semaine.”

- Tightening/difficulty in accessing credit – particularly of concern for small business, many participants recognizing that access to credit is an integral part of doing business for many small entrepreneurs. It is interesting to note that many participants see small business and its potential for job creation as an integral part of an eventual economic recovery; and
- More caution with regard to their own bottom line, some commenting that they either have or plan to reduce their discretionary spending habits, and that they are generally more cautious with their finances (less travel, reduced spending on entertainment). It is interesting to note however that although most attested to increased caution, there were a few participants around the table that suggested that the current economic context also provided opportunities, namely in terms of the now lower cost of certain large ticket items such as houses, vehicles and household appliances.

Threats to Canada's Economy

As was the case in the earlier round of focus groups, when participants were asked what they saw as the single biggest threat to Canada's economy, many around the table pointed to our longstanding and extensive trade relationship with our neighbours to the South. Indeed, participants were quick to point to our dependence on U.S. trade, the significant economic downturn being experienced in the U.S. and the possibility of protectionist tendencies (specifically tariffs on Canadian goods crossing the border) as likely being the single largest factor that will affect Canada's economy going forward.

"If the U.S. economy gets worse, then it will definitely affect us."

"All major corporations in the U.S. have bought Canadian companies. If we had tied ourselves to Europe, we wouldn't be as bad as we are. The States say 'Jump,' we say, 'How high?'"

Other factors mentioned included:

- High taxes – seen as reducing the amount of disposable income available to consumers in order to purchase products and consequently contribute to making the economy run;
- Brain drain – participants mentioned concerns about our youngest and brightest leaving to take on higher paying wages elsewhere. This was seen as a threat to Canada's ability to adapt to the new economic context and compete on a world stage in new and innovative sectors which many see as necessary if Canada is to maintain its economic standing globally;
- Political instability where many see the need for strong and decisive action from government;
- Personal debt and the likelihood that some will increase their reliance on credit at high interest levels in order to weather the storm;
- Lack of accountability from industry heads (GM, Chrysler are most often offered up as examples here);
- Concentration of wealth (a further polarization between rich and poor); and
- Foreign ownership.

How the Government Should Respond

Participants expect the Government to be active – there was a strong sense among many that the Government must not only be proactive in terms of coming up with ways to deal with the situation, it must also be proactive in terms of communicating what it is doing. There was some criticism of what some see as reaction as opposed to action.

“Leadership. Just government standing up and explaining what’s going on, the current situation, plans for the future, accountability, how they are spending the money and results. People know more about what is happening in America than Canada.”

“I wonder if they could come and present something at a grass roots level that everyone could understand.”

“Go to the ordinary people and have a news conference like a town hall.”

“Il faut communiquer au quotidien, qu’est-ce qu’on fait pour stimuler l’économie.”

Participants also expect government to be accountable and transparent, they want to know 1) what is being done, 2) why it is being done and 3) how these actions will improve our collective situation, that is, what are the expected outcomes.

When further prompted for specific actions they expect the Government to take in order to address the situation, most participants made suggestions that were centered on increased spending. Only a small number of participants felt that the Government ought not to attempt to stimulate the economy. Participants said the Government should consider:

- Investing in training and retraining for those laid off (with a particular focus on developing Canada’s knowledge based economy.);

“Putting money into retraining our ‘blue collar’ jobs.”

“Il faut subventionner les chômeurs pour retourner aux études.”

- Providing assistance with job searching;
- Spending on infrastructure (to provide jobs, equip the country for generations to come and consequently attract investment);

“They have to continue to put money into infrastructure, roads and bridges.”

« Il faut penser à la construction de route, la rénovation, parce que c’est facile à contrôler. »

- Promoting Canadian industry;

« Il faut acheter des produits d'ici, faire des subventions pour ça. »

- Investing in innovation;
- Improving accountability (both in terms of public sector spending and regulation of the financial sector);
- Lowering personal taxes - allowing Canadians to keep stimulus dollars in their own hands;
- Ensuring access to credit, grants and tax credits – for SMEs and startups – and repayable loans to viable industry sectors; and
- Investing in alternative energy/ promoting the “green” economy/ new technologies and promoting sustainable development.

“It would be nice if they got into an ecology program, making windmills, green technologies for each province, people that lost their jobs could be working...”

« Il faut investir dans le développement durable. »

There was some discussion in the groups about how the Government should fund all these new or increased investments. For some participants, it was appropriate for the Government to go into deficit in order to address so serious an economic downturn, for others, it was a sign that the Government was not managing responsibly. A few indicated that the Government ought to be able to pay for new priorities by cutting back on perceived waste and inefficiency.

Communications

Responding to Economic Concepts

As was the case in the earlier round of focus groups, participants in this most recent sounding were once again presented with a series of economic concepts and asked through a word association exercise to provide feedback on each. The following section highlights participants' reactions to each of these concepts according to tone i.e. positive vs. negative reactions.

Economic Stimulus

Most participants reacted positively to the term 'economic stimulus. The words they selected made it clear that they associate the term with current efforts of the government which they saw as 'helpful' and 'well intentioned.' Their explanations were often framed in the context of job creation. Other words that were offered were 'proactive' and 'forward-thinking,' with several participants pointing to infrastructure spending as an example of proactive economic stimulus spending. Some participants also associate economic stimulus with 'jumpstarting the economy or providing a jolt.'

Not all participants felt as positively about the term, however. For them, the term 'economic stimulus' brought to mind a 'band aid' solution; that is to say a quick fix and temporary solution, not likely to be substantive. Others responded by selecting words or terms such as 'same old, same old,' 'waste of money' or 'government-speak' – explaining that they saw it as the Government doing what governments do.

Economic Action Plan

Reactions to the term 'Economic Action Plan' tended to be somewhat more negative, with several participants indicating that they felt this term was 'political spin,' 'government-speak,' a 'buzz word,' 'propaganda' or 'misleading.': Many of these participants responded by expressing a strong desire for specifics: "What is the plan? Let's see it in writing." Even among those who did not have a negative reaction to the term itself, there were several who selected words such as 'reactive' to express frustration at what they perceived as a delayed response.

For those who had a more positive response to the term, it was the word 'action' which seemed to resonate most strongly. They selected words or terms such as 'just do it' or 'reassuring' or 'responsive,' explaining that the use of the word 'action' suggests a proactive approach that consists of more than just talk. Several mentioned being reassured by the notion that 'someone is actually thinking about how to address the situation.' Others responded to the term more broadly, viewing having an economic action plan as a necessary and usual thing for any government. They selected words like 'good idea' and 'required,' explaining that an economic action plan should be part of any budgetary process.

Credit

Participants offered a variety of word associations both positive and negative for the word 'credit.' From the explanations that they provided for their choices it was clear that some participants were referencing personal credit (which was mostly seen in a negative light, as evidence of mismanagement) and that others were thinking of businesses and the economy. Positive associations seemed to mostly relate to the usefulness and even necessity of credit. Participants used words like 'required' (cost of doing business) or 'helpful' (in an emergency situation). A few participants underlined the need to ensure that credit was available and 'affordable,' in terms of the interest rates offered.

As noted above, negative associations with the word credit were frequently related to the notion of 'mismanagement' of finances. Frequently this was to do with personal finances and the 'trouble' that people could get into by living beyond their means, given the high interest rates on credit card debt ('abuse'). Other participants characterized credit as a 'necessary evil' or as 'expensive'/'for the rich.'

Deficit

This was the term with which participants had the most difficulty. Several participants selected words like 'huh?' when asked for their association to this term.

Among those who understood the term, positive associations focused on participants' views that a deficit is needed at this time. Participants selected words like 'required' and 'necessary.' They explained that they view going into deficit as inevitable in the current economic climate and that it will allow significant investments in Canadian infrastructure. The positive associations hinged upon the deficit being a 'temporary solution' that is acceptable as long as it is well managed, for a defined period of time and not systemic. The most positive associations made were words like 'well-intentioned' and 'proactive.' Participants who selected these words felt that a deficit in these circumstances was a sign of good government in bad times.

Among those who made negative associations with the term 'deficit' some selected words like 'costly' and explained that they were worried about the long term impact on future generations of borrowing against "our children's future." Others selected words indicating they believe that going into deficit is a poor choice the Government should resist making. These participants opted for words like 'wasteful' and 'fight,' explaining they wanted to see the government resist the urge to go into deficit and instead prioritize spending better – "tough times call for tough choices." For others, going into deficit was evidence of a lack of planning and foresight. They chose terms like 'same old same old' to express the view that fluctuations in the economy are cyclical and governments have an inability to learn from the past.

Appendix I – Screener

English

Hello, my name is _____. I'm calling from Ipsos-Reid, a national opinion research firm. We're organizing a focus group to explore issues currently in the media. Focus Groups are discussions involving a small number of people that are brought together to talk about different topics. About ten people will be taking part, all of them randomly recruited by telephone just like you.

Participation is voluntary; all your answers will be kept confidential and will be used for research purposes only. We are simply interested in hearing your opinions – no attempt will be made to sell you anything. The format is a “round table” discussion lead by a research professional. An audio tape of the session will be produced for research purposes. The tapes will be used only by the research professionals to assist in preparing a final report on the research findings.

May I ask you a few questions?

Yes

No

1. Have I reached you at your home phone number:

Yes	CONTINUE
No	“MAY I SPEAK WITH SOMEONE WHO DOES LIVE HERE?” - THANK AND TERMINATE IF NON-RESIDENCE

2. Are you a Canadian citizen at least 20 years old who normally resides in the [XX] area?

Yes	CONTINUE
No	THANK AND TERMINATE

3. Please tell me if you or any member your immediate family works in or has retired from:

Market research	Y	N
Media (radio, TV, print)	Y	N
An employee of a political party	Y	N
An employee of a government department or agency that makes economic policy decisions	Y	N

IF YES TO ANY OF THE ABOVE, THANK AND TERMINATE



Ipsos Reid

4. Would you be available to attend a discussion group April xx, 2009? It will last no more than two hours and you will receive \$85 for your time (Coquitlam participants to receive \$100)?

Yes	CONTINUE
No	THANK AND TERMINATE

5. Gender [BY OBSERVATION ONLY; DO NOT READ. RECUIT A 50/50 SPLIT IN EACH GROUP]

Female

Male

6. Which of the following best describes your employment situation? Are you... [READ LIST]

Employed full-time

Employed part-time

Retired

Currently not working SKIP TO Q8 – MIN 2, MAX 3 PER GROUP

Student SKIP TO Q8

Homemaker SKIP TO Q8 – MAX 2 PER GROUP

Other _____

Refused

7. [IF EMPLOYED/RETIRED] What is/was your current/past occupation?
_____ PLEASE SPECIFY

8. How old are you? Are you.... READ LIST
ENSURE A GOOD MIX OF AGES IN EACH GROUP

20-25 years

25-34 years

35-44 years

45-54 years

55-64 years

65 years and older

Refuse/DK - THANK AND TERMINATE

9. Do you currently have children under the age of 18 living in the house with you? [RECUIT GOOD MIX]

Yes

No



10. Approximately, what was your total household annual income last year – 2008? [READ CATEGORIES IF NECESSARY] **FIRST GROUP TO BE MADE UP OF THOSE EARNING LESS THAN \$60,000 ANNUALLY ONLY, SECOND GROUP MADE UP OF THOSE EARNING \$60,000 OR MORE ANNUALLY ONLY.**

- Less than \$40,000 **[RECRUIT FOR FIRST GROUP ONLY]**
- \$40,000 to less than \$60,000 **[RECRUIT FOR FIRST GROUP ONLY]**
- \$60,000 to less than \$100,000 **[RECRUIT FOR SECOND GROUP ONLY]**
- More than \$100,000 **[RECRUIT FOR SECOND GROUP ONLY]**

11. Have you ever attended a consumer group discussion which was arranged in advance and for which you received a sum of money for participating?

Yes	CONTINUE
No	GO TO Q16

12. a. IF YES ABOVE, When was the last time you attended a group?
 _____ TERMINATE IF IN THE PAST 6 MONTHS, IF NOT, CONTINUE

b. IF PAST ATTENDER, What was the topic of the most recent focus group you attended? [TERMINATE IF TOPIC FINANCE/ECONOMY/POLITICAL RELATED]

13. If you suddenly had a million dollars, what would do you? (THE PURPOSE OF THE QUESTION IS TO TEST HOW ARTICULATE THE RESPONDENT IS IN EXPRESSING HIMSELF OR HERSELF).
 INTERVIEWER: USE THIS QUESTION TO TEST HOW ARTICULATELY RESPONDENT EXPRESSES HIM/HERSELF. IF RESPONDENT IS INARTICULATE OR UNCOMMUNICATIVE, THANK AND TERMINATE.

TERMINATE IF RESPONDENT OFFERS ANY REASON SUCH AS SIGHT OR HEARING PROBLEM, A WRITTEN OR VERBAL LANGUAGE PROBLEM, A CONCERN WITH NOT BEING ABLE TO COMMUNICATE EFFECTIVELY OR IF YOU HAVE A CONCERN.

Read to Stand-by Respondents

Thank you for answering my questions. Unfortunately, at this time, the group you qualify for is full. We would like to place you on our stand-by list. This means that if there is an opening in the group, we would then call you back and see if you are available to attend the group. May I please have a daytime contact number, an evening contact number an email address, if you have one, so that we can contact you as soon as possible if an opening become available? [RECORD CONTACT INFO]



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Location	Date	Time	Target Audience
Fredericton	April 2 nd	5:30	General Public household incomes of <u>less</u> than \$60k
		7:30	General Public household incomes of <u>more</u> than \$60k
Brampton	April 6 th	5:30	General Public household incomes of <u>less</u> than \$60k
		7:30	General Public household incomes of <u>more</u> than \$60k
Windsor	April 7 th	5:30	General Public household incomes of <u>less</u> than \$60k
		7:30	General Public household incomes of <u>more</u> than \$60k
Coquitlam	April 7 th	5:30	General Public household incomes of <u>less</u> than \$60k
		7:30	General Public household incomes of <u>more</u> than \$60k
Sherbrooke (French)	April 8 th	5:30	General Public household incomes of <u>less</u> than \$60k
		7:30	General Public household incomes of <u>more</u> than \$60k

As I mentioned earlier, the group discussion will take place, April xx @ 5:30pm/7:30pm for no more than 2 hours. The Government of Canada is sponsoring this research. All those who participate will receive an **\$85** honorarium as a thank you for their time. Would you be willing to attend? Note: **Coquitlam participants are getting \$100**

Yes	CONTINUE
No	GO TO Q14

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at:

CITY

Fredericton

Brampton

Windsor

Coquitlam

Sherbrooke



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We ask that you arrive at least fifteen minutes early to be sure you find parking, locate the facility and have time to check-in with the hosts. The hosts may be checking respondent's identification prior to the group, so please be sure to bring some personal identification with you (i.e. driver's license). Also, if you require glasses for reading, please bring them with you.

As we are only inviting a small number of people, your participation is very important to us. **IF FOR SOME REASON YOU ARE UNABLE TO ATTEND, PLEASE CALL SO THAT WE MAY GET SOMEONE TO REPLACE YOU.** You can reach us at 1-xxx-xxx-xxxx at our office. Someone will call you the day before to remind you about the discussion.

What would be a good time to reach you?
And at what telephone numbers?
May I please get your name? ON FRONT PAGE
Thank you for very much for your help!



Ipsos Reid

French

Bonjour, je m'appelle _____. Je vous appelle d'Ipsos-Reid, une firme d'étude nationale de l'opinion publique. Nous sommes en train d'organiser des groupes de discussion pour explorer des problématiques d'actualité couvertes par les médias. Les groupes de discussion sont des discussions regroupant un petit nombre de personnes rassemblées pour parler de différents sujets. Environ 10 personnes y participeront, toutes ayant été recrutées au hasard par téléphone, tout comme vous.

La participation est volontaire, toutes vos réponses demeureront confidentielles et ne seront utilisées qu'à des fins de recherche. Nous ne sommes intéressés qu'à recueillir votre opinion– nous ne chercherons pas à vous vendre quoi que ce soit. La discussion, de format table ronde, sera animée par un chercheur professionnel. Un enregistrement audio de la session sera effectué pour des fins d'étude. Les cassettes ne seront utilisées que par les professionnels de la recherche pour les aider dans la rédaction du rapport final sur les conclusions de l'étude.

Pourrais-je vous poser quelques questions?

Oui

Non

1. Est-ce que je vous appelle sur votre téléphone résidentiel :

Oui	01	
Non	02	REMERCIEZ ET TERMINEZ

2. Êtes-vous citoyen canadien âgé d'au moins 20 ans qui réside normalement dans la région de Sherbrooke ?

Oui	01	
Non	02	REMERCIER ET TERMINER

3. Veuillez m'indiquer si vous ou un membre de votre famille proche travaillez ou êtes retraité d'un des domaines suivants :

	Oui	Non
Recherche marketing	01	02
Media (radio, TV, imprimé)	01	02
Un employé d'un parti politique	01	02
Un employé d'un département ou d'une agence gouvernementale qui prend des décisions au niveau de la législation économique	01	02



Ipsos Reid

SO OUI A UN DES CAS CI-DESSUS, REMERCIER ET TERMINER

4. Seriez-vous disponible pour participer à un groupe de discussion le xx avril 2009 ? Cela ne durera pas plus de deux heures et vous recevrez 85 \$ pour votre?

Oui	01	CONTINUER
Non	02	REMERCIER ET TERMINER

5. ENREGISTREZ LE SEXE

Homme	01	50 % DANS CHAQUE GROUPE
Femme	02	50 % DANS CHAQUE GROUPE

6. Laquelle des situations suivantes décrit le mieux votre situation actuelle ? Etes-vous... [LIRE LISTE]

Employé à temps plein	01	
Employé à temps partiel	02	
Retraité	03	
Sans emploi	04	SAUTER À Q8 – MIN 2, MAX 3 PAR GROUPE
Étudiant	05	SAUTER À Q8
A la maison	06	SAUTER À Q8 – MAX 2 PAR GROUPE
Autre (précisez)	97	
Refus	99	

7. [SI EMPLOYÉ/RETRAITÉ] Quelle est/était votre occupation?
_____ PRÉCISEZ SVP

8. Quel âge avez-vous? Avez-vous.... LIRE LISTE
ASSURER UNE BONNE RÉPARTITION D'AGES DANS CHAQUE GROUPE

20 à 24 ans	01	
25 à 34 ans	02	
35 à 44 ans	03	
45 à 54 ans	04	
55 à 64 ans	05	
65 ans et plus	06	
Refus	99	REMERCIEZ ET TERMINEZ

9. Avez-vous présentement des enfants de moins de 18 ans résidant dans votre foyer ? [RECRUTER UNE BONNE RÉPARTITION]

Oui	01	CONTINUER
Non	02	REMERCIER ET TERMINER

10. Approximativement, à combien s'élève le total des revenus annuels de votre foyer pour l'année passée – 2008? [LIRE LES CATÉGORIES AU BESOIN]

Moins de 40 000\$	01	GROUPE 1 SEULEMENT
40 000\$ à 59 999\$	02	GROUPE 1 SEULEMENT
60 000\$ à 99 999\$	03	GROUPE 2 SEULEMENT
100 000\$ et plus	04	GROUPE 2 SEULEMENT
NE PAS LIRE Refus	99	REMERCIEZ ET TERMINEZ

11. Avez-vous déjà participé à un groupe de discussion de consommateurs qui a été planifié à l'avance et pour lequel vous avez reçu une somme d'argent en échange de votre participation ?

Oui	01	CONTINUER
Non	02	ALLER EN Q16

12. a. SI OUI CI-DESSUS, À quand remonte la dernière fois que vous avez participé à un groupe de discussion ?

Moins de 6 mois	01	REMERCIEZ ET TERMINEZ
Plus de 6 mois	02	

b. SI DEJA PARTICIPÉ, Quel était le sujet du plus récent groupe de discussion auquel vous avez participé ?

Finance	01	REMERCIEZ ET TERMINEZ
Économie	02	REMERCIEZ ET TERMINEZ
Politique	03	REMERCIEZ ET TERMINEZ
Autre sujet (précisez)	97	

13. Si vous receviez soudainement un million de dollars, que feriez-vous ? (LE BUT DE CETTE QUESTION EST DE VOIR À QUEL POINT LE RÉPONDANT EST ARTICULÉ LORSQU'IL S'EXPRIME).

INTERVIEWEUR: UTILISER CETTE QUESTION POUR VOIR A QUEL POINT LE RÉPONDANT EST CAPABLE DE S'EXPRIMER DE FAÇON ARTICULÉE. SI LE RÉPONDANT N'EST PAS ARTICULÉ OU COMMUNICATIF, REMERCIER ET TERMINER.

TERMINER SI LE RÉPONDANT DONNE UNE RAISON COMME UN PROBLÈME DE VUE OU D'OUIE, DES DIFFICULTÉS POUR S'EXPRIMER À L'ORAL OU À L'ÉCRIT, UN SOUCI DE NE POUVOIR COMMUNIQUER EFFICACEMENT, OU SI VOUS AVEZ DES RESERVES.

Lire aux répondants qui sont Quota Atteint

Merci d'avoir répondu à mes questions. Malheureusement, en ce moment, le groupe pour lequel vous êtes éligible est déjà rempli. Nous aimerions vous placer sur notre liste d'attente. Cela signifie que s'il y a une ouverture dans le groupe, nous vous rappellerons pour voir si vous êtes disponible pour participer au groupe.

Invitation

Come je l'ai mentionné plus tôt, le groupe de discussion se déroulera le Mercredi, le 8 avril @ _____ et ne durera pas plus de 2 heures. Le Gouvernement du Canada commandite cette recherche. Tous les participants recevront un honoraire de **85 \$** en remerciement pour leur temps. Êtes-vous intéressé à participer ?

Oui	01	CONTINUER
Non	02	REMERCIEZ TERMINEZ

Avez-vous un crayon à portée de main afin que je vous donne l'adresse où se tiendront les groupes ? Il se dérouleront à :

Emplacement	Heure	Audience cible
65, rue Belvédère Nord, bur. 120 Sherbrooke	5:30	Revenus de <u>moins</u> de \$60k
(Place Payton, en face de Radio Canada, près de la bibliothèque)	7:30	Revenus de <u>plus</u> de \$60k

Nous vous demandons d'arriver au moins quinze minutes à l'avance afin de vous assurer de trouver un stationnement, de trouver la salle et d'avoir le temps de vous enregistrer à l'accueil. La réceptionniste pourrait vérifier l'identité des répondants avant le début du groupe, alors veuillez vous assurer d'apporter des preuves d'identité avec vous (comme par exemple votre permis de conduire). Aussi, si vous avez besoin de lunettes de vue, n'oubliez pas de les apporter.

Comme nous invitons seulement un petit nombre de personnes, votre participation est très importante pour nous. **SI POUR UNE RAISON QUELCONQUE VOUS ÊTES DANS L'INCAPACITÉ DE PARTICIPER, VEUILLEZ NOUS APPELER AFIN QUE NOUS TROUVIONS UN REMPLAÇANT.** Vous pouvez nous rejoindre au 1-888-490-9341 et demander le poste 3179. **en référence à l'étude #7185.** Quelqu'un vous rappellera la veille du groupe pour rappeler votre participation à la discussion.

En vous souhaitant une agréable expérience, bonne journée !



Ipsos Reid

Appendix II – Moderator’s Guide

English

INTRODUCTION (5 Minutes)

‘Explain to participants:

- The role of moderator is to ask questions, timekeeper, objective/no special interest
- The length of the session (2 hours)
- Taping of the discussion, one-way mirror and colleagues viewing in back room
- Results are confidential and reported all together/individuals are not identified/participation is voluntary
- Role of participants: not expected to be experts, no need to agree with each other, speak openly and frankly about opinions and remember that there are no wrong answers
- Get participants to introduce themselves and their occupation/hobbies etc...

WARM UP: General Context (10 Minutes)

- So, how are things going for you personally?
- Thinking about the country in general, how are things going?
- How are things going in Ottawa?

ECONOMIC SITUATION (40 Minutes)

[ASSUMING THEY HAVE MENTIONED THE ECONOMY:] Many of you mentioned the economy as an area of concern.

- How is Canada’s economy doing? What makes you say that?
- Where do you think Canada’s economy is headed? Are you optimistic about the future? What makes you say that?
- What do you feel is going well? What do you feel is not going well?
- What have you seen or heard in your own life that suggests the economy is good or bad?
- How do you think things will be one year from now? What about 5 years from now?
- Is Canada’s national economic situation different from the economic situation in this province? What is different? What makes you say that?
- Have you changed any of your financial behaviour in the last few months?



- These are uncertain times and sometimes people lose their jobs. Can you describe for me what the Government should be doing to help these people? What if you found yourself without a job?
- What do you think the Government should be doing about the economy? [RECORD ANSWERS ON FLIP CHART]
- Countries around the world have are experiencing major economic challenges. Can you tell me what some of these countries are doing to help their economies? [PROBE FOR U.S. AND OTHER RECENT MEASURES.]
- What are the biggest threats to Canada's economy?

ECONOMIC ACTION PLAN [40 Minutes]

We have been talking a lot about the economy tonight. Can you tell me what the Government of Canada has been doing in relation to the economy? [RECORD ON FLIP CHART]

- *Word Association Exercise (using list):*
 - Economic Stimulus
 - Economic Action Plan
 - Deficit
 - Credit
 - Protectionism
- What additional steps do you think the Government should take to ensure that the Canadian economy remains internationally competitive and continues to attract investment and create jobs?

COMMUNICATIONS [20 Minutes]

- What types of actions could the Government do to make you feel comfortable with its handling of the economy? Why would this make you more comfortable?

CONCLUSION [5 Minutes]

We have covered a lot of topics today and really appreciate you taking the time and energy to come down here and give your opinion. Your input is very important and insightful!

- To conclude, I wanted to ask you whether you have any last thoughts that you want to give the Government of Canada.



French

INTRODUCTION (5 minutes)

Expliquer aux participants :

- Le rôle du modérateur est de poser des questions et de veiller au bon déroulement de la rencontre; il est objectif/n'a aucun intérêt direct.
- Durée de la rencontre (2 heures)
- Enregistrement de la rencontre/miroir d'observation et collègues dans la salle attenante
- Les résultats sont confidentiels et seront rapportés globalement/les personnes ne sont pas identifiées/la participation est volontaire.
- Le rôle des participants : pas besoin d'être un expert; aucun consensus n'est requis; exprimer leur opinion ouvertement et en toute franchise; il n'y a pas de mauvaises réponses.
- Demander aux participants de se présenter et de parler de leur profession/de leurs loisirs, etc.

MISE EN TRAIN : Contexte générale (10 MINUTES)

- Comment vont les choses pour vous personnellement?
- Si vous pensez au pays en général, comment vont les choses?
- Comment vont les choses à Ottawa?



SITUATION ÉCONOMIQUE (40 MINUTES)

[EN SUPPOSANT QU'ILS ONT MENTIONNÉ L'ÉCONOMIE :] Un grand nombre d'entre vous ont mentionné que l'économie était un objet de préoccupation.

- Comment se porte l'économie du Canada? Qu'est-ce qui vous fait dire cela?
- Selon vous, dans quelle direction se dirige l'économie du Canada? Êtes-vous optimiste en ce qui concerne l'avenir? Qu'est-ce qui vous fait dire cela?
- Qu'est-ce qui va bien selon vous? Qu'est-ce qui ne va pas bien selon vous?
- Qu'avez-vous vu ou entendu dans votre propre vie qui laisse supposer que la situation économique est bonne ou mauvaise?
- Selon vous, quelle sera la situation dans un an? Et dans cinq ans?
- Est-ce que la situation économique nationale du Canada est différente de la situation économique de la province? Qu'est-ce qui est différent? Qu'est-ce qui vous fait dire cela?
- Avez-vous changé votre comportement financier d'une façon ou d'une autre au cours des derniers mois?
- Nous sommes en période d'incertitude et parfois, les gens perdent leur emploi. Pouvez-vous me décrire ce que le gouvernement devrait faire pour aider ces gens? Que feriez-vous si vous vous retrouviez sans emploi?
- Selon vous, qu'est-ce que le gouvernement devrait faire au sujet de l'économie?
[INSCRIRE LES RÉPONSES SUR LE TABLEAU DE PAPIER]
- Des pays de partout dans le monde sont confrontés à d'importantes difficultés économiques. Pouvez-vous me dire ce que font certains de ces pays pour aider leur économie? [SONDER SUR LES MESURES DES ÉTATS-UNIS ET AUTRES MESURES RÉCENTES.]
- Quelles sont les plus grandes menaces pour l'économie du Canada?

PLAN D'ACTION ÉCONOMIQUE [40 minutes]

- Ce soir, nous avons beaucoup parlé d'économie. Pouvez-vous me dire les mesures que le gouvernement du Canada a prises en ce qui concerne l'économie? [INSCRIRE LES RÉPONSES SUR LE TABLEAU DE PAPIER]
- Exercice d'association de mots (à l'aide de liste) :
 - Stimulation de l'économie
 - Plan d'action économique
 - Déficit
 - Crédit
 - Protectionnisme
- Selon vous, quelles autres mesures devrait prendre le gouvernement pour que l'économie canadienne reste concurrentielle à l'échelle internationale et continue d'attirer des investissements et de créer des emplois?

COMMUNICATIONS [20 minutes]

- Quels types de mesures le gouvernement pourrait-il prendre pour que vous soyez à l'aise avec la façon dont il gère l'économie? Pourquoi est-ce que cela vous rendrait plus à l'aise?

CONCLUSION [5 minutes]

Nous avons couvert un grand nombre de sujets et je vous remercie d'avoir consacré du temps et de l'énergie pour venir partager votre opinion ici aujourd'hui. Votre opinion est très importante et éclairante!

- Pour conclure, j'aimerais savoir si vous avez d'autres commentaires que vous voudriez communiquer au gouvernement du Canada.

